

EL513141986US
"Express Mail" Mailing Label No.

November 16, 2000
Date of Deposit

Our Case No. 9974/55
(Amway Ref. No. BH2090.P3)

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE
APPLICATION FOR UNITED STATES LETTERS PATENT

INVENTORS:

William S. Kerker
Thomas D. Paasche

TITLE:

SYSTEM AND METHOD FOR
MANAGING RECURRING ORDERS
IN A COMPUTER NETWORK

ATTORNEY:

James L. Katz (Reg. No. 42,711)
BRINKS HOFER GILSON & LIONE
POST OFFICE BOX 10395
CHICAGO, ILLINOIS 60610
(312) 321-4200

SYSTEM AND METHOD FOR MANAGING RECURRING ORDERS IN A COMPUTER NETWORK

RELATED APPLICATIONS

5 This application is a continuation-in-part under 37 C.F.R. § 1.53(b) of U.S. Pat. Application Ser. No. 09/515,860, *Revised 3625* filed February 29, 2000 now U.S. Pat. No. _____, the entire disclosure of which is hereby incorporated by reference, which claims priority under 35 U.S.C. § 119(e) to U.S. Provisional Application Serial No. 60/122,385, filed March 2, 1999 and U.S. Provisional Application Serial No. 60/126,493, filed March 25, 1999.

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BACKGROUND

15 Whether speaking of traditional brick and mortar commerce or electronic commerce, often the key to making or losing a sale comes down to customer convenience. A consumer is less likely to make a purchase if it is inconvenient for him or her to do so. The mail/phone order catalog industry is based on the premise that it is more convenient for a user to shop from home and have their purchases delivered than for them to visit a store.

20 However, beyond making that first sale, retailers attempt to generate repeat sales to previous customers to keep their businesses viable. The better the first shopping experience is for a customer, the more likely the customer will make subsequent purchases.

Automated repeating order systems have been implemented to increase customer loyalty. Such systems include negative response systems such as record/compact disc clubs which send out a different product, i.e. a different recording, on a fixed interval, e.g. monthly, if the consumer fails to return a response card. Negative response systems also include systems wherein a user agrees to purchase a specified dollar amount in products or services. Where the user fails to meet the specific amount for the given interval, the system automatically ships products or services to make up the difference. Other repeat order systems include "product of the month" systems which deliver a different product, selected from a category of products, every month. These systems include flower of the month or fruit of the month which deliver a different variety of the product every month for a specific number of months.

The problem associated with the above repeating order systems is that they are structured to provide vendor convenience over consumer convenience. Such systems derive benefit for the vendor from the inconvenience to the consumer involved in returning the response cards, returning the unwanted products or meeting minimum purchase requirements. Often, consumers receive unwanted products but do not want to deal with the hassles of returning the products or stopping the shipments. Further, these systems fail to reduce the number of shopping experiences for the consumer because they are usually associated with vendors which offer a limited product selection.

In electronic commerce, consumers have convenient access to products and services offered by multiple vendors, also known as "e-tailers", on the Internet. With the click of a mouse, a particular consumer can jump from one web site to another. They may do this for a myriad of reasons, including obtaining a marginally lower price, obtaining an incentive offer or just because the first web site was too inconvenient to navigate. In addition, establishing repeat customers at a particular web site for items which are used again and again is proving difficult. Web retailers have more success with one-time purchases, typically for durable goods such as books, gifts, or airline tickets, than with repeat purchases, typically for consumable goods such as detergent, deodorant or shampoo. Obtaining and

particularly retaining customers has become an important issue as the electronic commerce industry matures.

Electronic commerce retention strategies include stream lining web site designs, improving customer service and improving product selection. Typically, a strategy for streamlining a web site includes simplifying the navigation, organizing the content, and simplifying the order entry and processing. An example of such a strategy is described in U.S. Pat. No. 5,960,411 which discloses a 1-click ordering system which allows repeat customers to order products with one operation. However, further or different retention strategies may better maintain a customer's loyalty for future purchases.

Accordingly, there is a need to increase the convenience of purchasing products and services in the electronic commerce environment. Specifically there is a need to improve the convenience for making purchases from one or more electronic commerce vendors to improve the acquisition of new customers and the retention of existing customers through a reduction in consumer frustration, costs and resources associated with the shopping experience.

SUMMARY

The present invention is defined by the following claims, and nothing in this section should be taken as a limitation on those claims. By way of introduction, the preferred embodiments described below relate to establishing automatic repeat ordering for orders using a computer network.

In one aspect, an order management system facilitates electronic commerce over a network wherein the network comprises at least one server computer capable of communicating with a browser system located at a remote client computer over the network. The order management system includes an order receiver operative to receive a first request for a first suggested order, the first suggested order comprising a first one or more suggested products or services of a plurality of products or services, a first suggested recurrence for each of the first one or more suggested products or services and first suggested quantities. The

order management system further includes a profile generator coupled with the order receiver and operative to generate a first profile, the first profile comprising the first suggested order. The order management system also includes an order generator responsive to the first profile and operative to cause the first suggested order to automatically recur one or more times according to the first suggested recurrence.

In another aspect, a method facilitates electronic commerce through a network. The network comprises at least one server computer capable of communicating with a browser system located at a remote client computer. The method includes: receiving a first request for a first suggested order, the first suggested order comprising a first one or more suggested products or services of a plurality of products or services, a first suggested recurrence for each of the first one or more suggested products or services and first suggested quantities; and generating a first profile, the first profile comprising the first suggested order, wherein the first suggested order automatically recurs one or more times according to the first suggested recurrence.

Further aspects and advantages of the invention are discussed below in conjunction with the preferred embodiments.

BRIEF DESCRIPTION OF THE DRAWINGS

FIG. 1 depicts a block diagram of a preferred embodiment of a recurring order management system.

FIG. 2 depicts a more detailed block diagram of the recurring order management system of FIG. 1.

FIG. 3A depicts a block diagram of a first preferred profile for use with the recurring order management system of FIG. 2.

FIG. 3B depicts a block diagram of a second preferred profile for use with the recurring order management system of FIG. 2.

FIG. 4 depicts a block diagram of the calculator function of FIG. 2.

FIG. 5 depicts a block diagram of the assessment interface of FIG. 2.

FIG. 6 depicts a block diagram of the packages/templates interface of FIG. 2.

FIG. 7 depicts a schematic diagram of the structure of the recurring order management system of FIG. 2.

FIG. 8 depicts first preferred profile database tables for use with the recurring order management system of FIG. 2.

FIGS. 9-11 depict a schematic diagram of a preferred back end process for use with the recurring order management system of FIG. 2.

FIG. 12 depicts a first preferred interface screen for the recurring order management system of FIG. 2.

FIG. 13 depicts a second preferred interface screen for the recurring order management system of FIG. 2.

FIG. 14 depicts a first preferred descriptive screen for the recurring order management system of FIG. 2.

FIG. 15 depicts a second preferred descriptive screen for the recurring order management system of FIG. 2.

FIG. 16 depicts a first preferred confirmation/modification interface screen for the recurring order management system of FIG. 2.

FIG. 17 depicts a first preferred profile data entry interface screen for the recurring order management system of FIG. 2.

FIG. 18 depicts a first preferred profile confirmation screen for the recurring order management system of FIG. 2.

FIGS. 19A-B depict a third preferred interface screen for the recurring order management system of FIG. 2.

FIGS. 20A-B depict a first preferred assessment interface screen for the recurring order management system of FIG. 2.

FIGS. 21A-B depicts a first preferred packages/templates interface screen for the recurring order management system of FIG. 2.

FIG. 22 depicts a second preferred confirmation/modification interface screen for the recurring order management system of FIG. 2.

DETAILED DESCRIPTION OF THE PRESENTLY PREFERRED EMBODIMENTS

The preferred embodiments relate to a standing/recurring order management system which allows a consumer to set up a standing order for products or services. The standing order automatically repeats according to a recurrence pattern specified by the user. Selected products or services are sent to the user, i.e. fulfilled, at regular intervals based on the recurrence pattern. The system facilitates the establishment of long term orders, enhancing consumer convenience and loyalty. While the embodiments are discussed in relation to individual consumers, the embodiments are applicable to any entity which purchases products or services including, but not limited to, industrial purchasers, electronic commerce retailers/wholesalers, brick and mortar retailers/wholesalers and direct sales retailers/wholesalers. Products and services include, but are not limited to, consumer products or services intended as inventory or for end user consumption and industrial products or services, including consumable and durable goods or services.

A problem with most web selling strategies is that, while the customer's visit to the electronic store-front may be pleasant, the customer still has to visit every time they wish to make a purchase, often for the same item, again and again. Where a particular customer buys multiple products from multiple vendors, they must repeatedly visit multiple web sites and undertake the purchasing process at each web site. Wherein each web site may offer a convenient shopping experience, that convenience is lost in the multitude of shopping experience that the consumer must undertake to complete their shopping needs. This may lead to customer frustration and ultimately the loss of that customer to one or more electronic commerce vendors or to traditional brick and mortar retailers. Where a particular customer is actually a business which purchases their inventory, office supplies, etc. from electronic commerce based vendors, executing repeated purchases from multiple vendors results in increased costs and wasted resources. Accordingly, there is a need to reduce the number of shopping experiences in a customer's life in order to make shopping on the web truly convenient.

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Referring now to Figure 1, there is shown a recurring order system 100 which allows a consumer 102 to set up a standing order for one or more products or services offered by an electronic commerce vendor 104A, B via a network 106 with a recurring order management system 108. The system 106 causes the standing order to recur at an interval. Upon each recurrence, the standing order is transmitted to a fulfillment entity 110A, B which fulfills the standing order to the customer 102. The recurring order management system 108 is preferably implemented on one or more server computers coupled with the network 106.

In the preferred embodiment, the consumer 102 includes an individual consumer (single person or family) having a personal computer, such as a Pentium III based personal computer or equivalent manufactured by Intel Corporation, located in Santa Clara, California, running the Windows 98 operating system, manufactured by Microsoft Corporation, located in Redmond, Washington, and having a browser program, such as Internet Explorer version 5.0, also manufactured by Microsoft Corporation or Netscape Navigator. Other personal computers, operating systems and browser programs may be used.

The consumer 102 is coupled with the network 106, which is preferably the Internet, so as to be able to browse and interact with web sites, also coupled with the Internet, using the browser program. Such web sites include sites provided by the electronic commerce vendors 104A, B (described below). Herein, the phrase "coupled with" is defined to mean directly connected to or indirectly connected with through one or more intermediate components. Such intermediate components may include both hardware and software based components. In an alternative embodiment, the consumer 102 may use a telephone to communicate with an operator that is linked with the recurring order management system 108 on behalf of the consumer 102.

In an alternative embodiment, the consumer 102 is a business or corporation or representative thereof and may include business to business procurement management systems. Further, the consumer 102 may include independent direct sales business owners of a multi-level marketing organization. In addition, the network 106 may be a different type of publicly accessible

network, such as a cable or satellite network, a private network such as a subscription based network, e.g. America On-Line, an intranet or a private extranet, or combinations thereof.

The electronic commerce vendor 104A, B is preferably a web site based vendor of products and/or services. In one embodiment, the vendor 104A, B is the Quixtar web site, provided by Amway Corporation, located in Ada, Michigan and accessible at <http://www.quixtar.com>. In this embodiment, the vendor 104A, B is affiliated with a multilevel marketing organization which enrolls participants as clients, members or independent business owners ("IBO"), each with different participation privileges and responsibilities. The electronic commerce vendor 104A, B may also be a traditional marketing based vendor. Further, the vendor 104A, B may include one or both of electronic commerce and traditional brick and mortar store fronts. Alternatively, the vendor 104A, B may comprise only the fulfillment entity 110A, B and operate no storefront. In this case, the vendor 104A, B may rely on the order management system 108 to receive and process orders wherein the vendor 104A, B fulfills those orders as the fulfillment entity 110A, B.

The products or services offered by the vendor 104A, B include consumer products or services such as toothpaste, shampoo and other consumables as well as consumer electronics and other durable goods, etc. Services may include reminder services (described in more detail below), cleaning services, maintenance services or legal, accounting, secretarial or other professional services, or subscription based services such as magazines, book clubs, cellular service, voice mail service, etc. Further the offered products or services may also include office supplies, business inventory or office or business related services.

The fulfillment entity 110A, B is an entity, such as a warehouse and/or shipping agent, which provides the products or services to the end consumer. In the preferred embodiments, the fulfillment entity 110A, B is associated with the electronic commerce vendor 104A, B. In alternative embodiments, the fulfillment entity 110A, B is separate from the vendor 104A, B wherein the vendor 104A, B out-sources order fulfillment to one or more fulfillment entities 110A, B. The

electronic commerce vendor 104A, B communicates with the fulfillment entity via the network 106 or via a private/internal communications channel. The fulfillment entity 110A, B fulfills orders for products or services by shipping or otherwise providing the products or services to the end consumer 102. Electronically distributable products or services, such as software, music or reminders may be fulfilled via the network 106.

In one embodiment, the recurring order management system 108, the vendor 104A, B and the fulfillment entity 110 are all comprised by the same entity 112. In alternative embodiments, one or more of the order management system 108, the vendor 104A, B or the fulfillment entity 110 are comprised by separate entities and further, order management system 108 can interact with multiple vendors 104A, B and multiple fulfillment entities 110A, B.

Figure 2 shows a more detailed diagram of the order management system 108 of Figure 1. In the preferred embodiment, the system 108 is coupled with the vendor 104A, B via hyper text transfer protocol ("HTTP") links displayed on a web site/web pages/screens associated with the vendor 104A, B. The web pages are associated with products or services provided by the vendor 104A, B and preferably provide a link to the order management system 108 so as to allow the particular product or service to be added to a standing order. In one embodiment, the link may be a Standing Order link provided on a particular product or service description page, an order entry page or a shopping cart/basket management page.

By choosing the Standing Order link, the consumer 102 is forwarded to an order management system interface 202, 204, preferably implemented as a web page, that allows the consumer 102 to create a new standing order profile or update an existing profile (described in more detail below). A standing order profile allows a consumer 102 to set up an automated order system that sends products and/or services to the user at regular intervals, which are selected by the user. Such standing orders provide an efficient method for establishing repetitive orders of products and/or services from the vendor 104A, B.

In one embodiment, all items in the user's shopping cart are placed in the new or existing profile utilizing the interface 204. The user then has the option of

removing items from the profile. Consumers 102 are alerted in the shopping cart management page, preferably after checkout, when a particular item can be placed on standing order. Alternatively, the user selects items from the shopping cart to be included in the profile. Consumers 102 may place individual products or an entire order on a standing order quickly and easily. Users may also have multiple standing orders and the ability to add an item to a standing order on a one-time basis. As will be discussed below, consumers 102 may also interact with the order management system 108 directly to create and manage profiles.

10 *SUB A2* The order management system 102 includes a profile generator 202, a profile management interface 204, a profile database 206 and an order generator 208. As will be discussed in more detail below, a standing/recurring order for a particular consumer 102 is stored in a profile 210. The profile 210 includes a list of products or services, preferably identified by an identifier such as a stock keeping unit ("SKU"), and a specification of how much and when, i.e. the recurrence, each of those products or services are to be delivered/provided. The profile 210 further includes payment and delivery information. The profile 210 preferably contains enough information to repeatedly fulfill the recurring order without further interaction from the consumer 102. Less information or additional information may be maintained as part of the profile.

20 The recurrence specifies when the order management system 108 is to generate the order to the fulfillment entity 110A, B and the frequency with which the order should be generated. In alternative embodiments, the recurrence specifies when the consumer 102 desires to receive the products or services and the frequency or delivery interval. For example, the profile 210 may specify that an order for two twelve ounce bottles of shampoo is to be generated on the 2nd day of every other month. In this case, the order will be generated on the 2nd day of the month and the recurrence interval is every two months, with the actual delivery taking place once the order has been processed by the fulfillment entity 110A, B. Alternate recurrence intervals include daily, weekly, monthly, yearly, etc. and may be defined by the consumer's 102 needs, such as defined by the predicted lifespan of the product. For example, if a consumer 102 orders a quantity of a specific

product that lasts 38 days under normal usage, the recurrence interval for shipping additional quantities of that product may be every 38 days. Further, the order generation or scheduled delivery can be specified as a particular day of the week, e.g. deliver on Tuesdays, a particular day or week of the month, e.g. the third day or third week of the month or the first Tuesday of the month, a particular day or week of the year, etc. or any other specification which identifies a preferred order generation or order delivery day. In one embodiment, a profile 210 comprises a group of products or services to be delivered in each shipment according to the specified recurrence. Where a consumer 102 desires to receive products or services delivered in more than one shipment, additional profiles 210 may be created for the user. For example, where a consumer 102 desires to receive one bottle of shampoo each month on the second day of the month and one bottle of conditioner each month on the 18th day of the month, two separate profiles 210, one for the shampoo and the other for the conditioner, are generated.

Referring to Figure 3A, there is shown an exemplary profile 210. The profile 210 includes user information 302, such as name, address, account number, demographic information and preference information. Demographic information comprises objective descriptive classifications of consumers such as their age, sex, income, education, size of household, ownership of home, pet ownership, etc. The profile 210 further includes an order matrix 304, a fulfillment schedule/interval 306, payment information 308 and delivery information 310. The payment information 308 includes information about how the consumer 102 intends to pay for each recurring order and includes a billing address, credit or debit card/account information or other identifier of a fund source. In the preferred embodiments, the payment information 308 includes information which allows the order management system 108 to automatically collect payment for each recurring order at the time, or in advance of fulfillment.

The delivery information 310 includes information about where to ship the orders. This information may specify a different address than the billing address or even a different address from the address where the customer 102 resides.

Where the recurring order is a gift, the delivery information 310 identifies the delivery address of the gift recipient and may include a gift message.

The order matrix 304 lists each product or service in the standing order.

Each product or service is preferably identified by a SKU and a product description. Adjacent to each product or service is the quantity of that product or service that is to be delivered upon each iteration of the recurring order.

Preferably, the quantities are specified as the number of units of the particular product, for example, two twelve ounce bottles of shampoo. Alternatively, the quantities can be specified in bulk, cases or lots in addition to units, eaches or singles. In the preferred embodiment, there are twelve iterations, one for each month of the year. Alternatively, 52 iterations, 1 for each week of the year, are provided as a default or the number of iterations may be customized by consumer 102. The order matrix 304 allows the consumer 102 to specify a different quantity for each iteration depending on their needs for the particular product or service.

The fulfillment schedule/interval 306 defines when each iteration of the recurring order should be delivered, such as on the 3rd day of each particular month. The fulfillment schedule/interval 306 may further specify the number of iterations in the recurring order. Upon each iteration of the recurring order, an order for each of the products or services listed is generated in the specified quantities for that iteration and transmitted to the fulfillment entity 110A, B to be fulfilled.

In an alternate embodiment, a recurrence of individual products or groups of products are set up on different recurrence schedules within one profile 210. Further, the profile 210 specifies the quantities to be delivered on each recurrence.

As will be discussed below, products or services are typically available in a particular unit quantity, such as a twelve ounce bottle, also known as "eaches" or "units" where bulk quantities are referred to as "cases" or "lots". Consumers 102 may specify standing orders which ships lesser quantities more frequently or larger quantities less frequently. Such specifications may depend on the product shelf life or the consumer's 102 ability to store the excess products. Further, such

specifications may be tied to promotional offers by the vendor 104A, B of the particular products or services.

Figure 3B shows a profile 210 which allows any product to be delivered at any time. Profile 210 of Figure 3B is similar to profile 210 of Figure 3A including user information 302 except that the order matrix 312 allows each product or service entry to specify a fulfillment schedule/interval for that product or service independent of the schedule/interval for other products or services. In an alternative embodiment, the consumer 102 may specify a delivery schedule for the particular product which defines when that product or service will be actually delivered, such as a periodic schedule or a variable schedule. Further, in another alternative embodiment, the consumer 102 may specify payment or delivery information for each product or service. For example, one particular product is charged to one account and delivered to one particular address while another product or service is charged to a second account and delivered to a different address.

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In still another embodiment, the order matrix 312 may include a category field for each product or service allowing the consumer 102 to categorize and organize listed products or services to facilitate managing and maintaining the recurring order. Products or services may be categorized and grouped to allow group manipulation and modification. In another alternative embodiment, the profile 210 allows the specification of recurring reminders, which are discussed in more detail below. In still another embodiment, the profile 210 is calendar centric rather and product centric and is structured as a daily, monthly or yearly calendar allowing the consumer 102 to specify, by day or date, products and/or services and quantities to be delivered. In addition the consumer 102 specifies the recurrence, i.e. that the order for that particular product or service or group of products or services should recur on that day each month, or every other month or the order should recur every 30, 60 or 90 days thereafter, or that the order is one time only. For example, the consumer 102 may specify that on the first Tuesday of October, 2 twelve ounce bottles of shampoo are to be ordered and that this order should recur on the first Tuesday of every other month thereafter.

Again referring to Figure 2, the profile generator 202 further includes a single product interface 212, a shopping cart interface 232, a reminder interface 218, a packages/templates interface 220, an assessment interface 222 and a transaction history interface 224. Each of these interfaces 212, 232, 218, 220, 222 and 224 is used to add products or services to an existing profile or create a new profile for these products or services. Preferably, each of these interfaces 212, 232, 218, 220, 222 and 224 create a temporary suggested profile 210 which the consumer 102 may modify, cancel or confirm/accept. Upon confirmation/acceptance, the suggested profile 210 is activated and stored in the profile database 206. It will be appreciated that the interfaces 212, 232, 218, 220, 222 and 224 can directly create an active profile which the consumer 102 then has the option to modify or cancel. Further, the profile generator 202 includes calculator 214 and balance 216 functions and a profile confirmation/modification interface 226. The profile generator 202 provides both an interface to the order management system 108 as well as the functionality to generate profiles 210. In the preferred embodiment, this interface comprises one or more web pages which present instructions to the consumer 102 and receive input from the consumer 102 using the hypertext transport protocol ("HTTP"), hypertext markup language ("HTML"), extensible markup language ("XML") or equivalent communications protocols and web page construction languages, or combination thereof, as are known in the art.

The single product interface 212 is used to add a particular product or service to an existing profile 210 or creates a new profile 210 for the product or service. The interface 212 can be accessed by the consumer 102 via the vendor 104A, B as described above or can be directly accessed by the consumer 102. For example, the vendor 104A, B can provide an HTTP link on a web page/file associated with a particular product or service to allow the consumer 102 to add that particular product or service to a standing order. The consumer 102 selects the link and is forwarded to the single product interface 212 of the order management system 108 where options are presented to specify the desired quantities and recurrence. Where the consumer 102 accesses the single product

interface 212 directly, the interface 212 allows the consumer 102 to identify one or more desired products or services, such as by entering a product or service name or a SKU and, where necessary, a vendor 104A, B identifier. Alternatively, the single product interface 212 may provide HTTP links which provide the consumer 102 web pages associated with products or services provided by the vendors 104A, B. These web page may be provided by the vendor 104A, B or by the order management system 108.

The shopping cart interface 232 operates similarly to the single product ordering interface 212 and can be linked to from the shopping cart/basket web pages of the vendor 104A, B. A consumer 102 may add an entire shopping cart of products or services to a standing order profile 210 with one action. In an alternative embodiment, where the vendors 104A, B provide persistent shopping carts which maintain selected but unordered products or services beyond the consumer's 102 browsing session, the consumer 102 accesses the shopping cart interface 232 which is coupled with each persistent shopping cart that a consumer 102 has opened and allows the consumer 102 to add one or more products from one or more of those existing shopping carts to a standing order profile 210.

The packages/templates interface 220 allows the consumer 102 to pick from a set of predefined product groupings. Each product grouping includes one or more suggested products or services, a suggested recurrence for the grouping and suggested quantities to be delivered upon each recurrence. Suggested products or services are arranged and grouped based on a relationship among the products or services. For example, a product grouping may be provided, entitled "fitness freak" and comprise one or more suggested products or services related to health and fitness with suggested recurrences for each of the products or services tailored for a physically active consumer 102. Further, a grouping may be offered, entitled "family of 4" and comprise one or more suggested products or services that an average family of four might use along with a suggested recurrence pattern. Groupings may be offered based on any aspect of consumer 102 demographics or preferences or may be offered as a promotion coupled with free products or services, a discount price or other incentive opportunity. Where the vendor 104A,

B comprises a multilevel marketing system and the consumer 102 is a direct sales representative or independent business owner within the marketing system, groupings may be provided which are tailored to helping the consumer 102 reach a particular sales or bonus goal.

Further, the selection of groupings offered to a particular consumer 102 may be tailored to the consumer's 102 demographics or preferences or where the vendor 104A, B comprises a membership club, the selection may be tailored to the consumer's 102 membership level. In one embodiment, the packages/templates interface 220 first determines the consumer's 102 demographics and preferences, such as through an interactive questionnaire or an interactive pick list or by referring to such information stored in a profile 210. Using the consumer's 102 responses, the packages/templates interface 220 generates/displays a selection of product or service groupings which match the consumer's demographics and/or preferences. In the preferred embodiments, groupings are referred as templates for new customers of the order management system 108 and are tailored to getting the new customer started with their recurring order. Further, groupings are referred to as packages for existing customers with existing profiles 210 and are tailored to assisting existing customers with updating their profiles 210.

Figure 6 shows a block diagram of the packages/templates interface 220. The interface 220 comprises an interface web page 602 which presents the selection of suggested product or service groupings to the consumer 102. The available product and service groupings are stored in a database 606. The database 606 is coupled with the interface 602 via the filter 604 which is used to control which product or service groupings are made available to the consumer 102 as described above. The interface 606 is coupled with a response processor 608 which receives the selection from the consumer 102 of a product or service grouping. The response processor 608 retrieves the desired product or service grouping from the database 606 and forwards the grouping to the generator 610. Alternatively, the response processor 608 displays the contents of the particular selected grouping via the interface 602 to confirm the consumer's 102 selection. The generator 610 generates a suggested profile 210 comprising the one or more

products or services from the groupings and the suggested recurrence pattern. The suggested profile 210 is then made available for balancing (described in more detail below) or sent to the profile confirmation/modification interface 226 (described in more detail below).

5 Referring to Figure 2, the assessment interface 222 provides an interface to the order management system 108 for consumers 102 who are new to the order management system or who desire assistance in choosing products or services, proper quantities, or a proper recurrence. The assessment interface 222 provides one or more interactive messages to the consumer 102 in order to determine and suggest which products or services, quantities and what recurrence pattern would be appropriate for that consumer 102. The interactive messages may comprise option lists from which the consumer 102 chooses, questions which the consumer 102 answers or other information gathering methods. Information relating to one or more of consumer 102 demographics, subjective preferences and actual product usage may be gathered. Wherein the consumer 102 has an existing profile 210, one or more pieces of this information may be retrieved from the stored profile 210. For example, a consumer 102 may be asked if they do laundry themselves. If the answer is yes, they may be presented with an option list to select how many times they do laundry in a month. Further they may be asked if they are male or female, how old they are, yearly income and whether or not they use fabric softener.

20 The series of interactive messages may be part of a hierarchical or linear interrogatory or process flow which is used to determine which particular product or service should be suggested and what the suggested quantities and recurrence should be. In one embodiment, a first series of one or more interactive messages is related to determining whether a particular product is or would be used, while a second associated series of one or more interactive messages is used to determine the suggested recurrence and quantities per recurrence. In one embodiment, each response to the second series of interactive messages is associated with a multiplier which is used to compute the suggested recurrence and quantities. A first and second series of interactive messages are provided for different products

or services. In an alternative embodiment, the assessment interface 222 presents a series of interactive messages designed to determine which name brand products the consumer 102 currently uses. The assessment interface 222 then determines a suggested profile 210 of suitable replacement products or services provided by the vendor 104A, B. Such a suggested profile 210 may be accompanied by a report of the cost savings over the name brand products.

Table 1.0, below, lists exemplary questions, expected responses and associated products for the preferred assessment interface 222.

TABLE 1.0

CATEGORY DESCRIPTION	ASSESSMENT QUESTION	ASSOCIATED ANSWERS	RELATED PRODUCT(S)
Household Size	How many people live in the household full time?	Four+	<Multiplier value>
Household Size	How many people live in the household full time?	Three	<Multiplier value>
Household Size	How many people live in the household full time?	Two	<Multiplier value>
Household Size	How many people live in the household full time?	One	<Multiplier value>
Household Size	How many people live in the household full time?	None	<Multiplier value>
Household Size	Number of females, 16 years or older	One	<Multiplier value>
Household Size	Number of females, 16 years or older	None	<Multiplier value>
Household Size	Number of females, 16 years or older	Four+	<Multiplier value>
Household Size	Number of females, 16 years or older	Three	<Multiplier value>
Household Size	Number of females, 16 years or older	Two	<Multiplier value>
Household Size	Number of males, 16 years or older	Four+	<Multiplier value>
Household Size	Number of males, 16 years or older	Three	<Multiplier value>
Household Size	Number of males, 16 years or older	Two	<Multiplier value>
Household Size	Number of males, 16 years or older	One	<Multiplier value>
Household Size	Number of males, 16 years or older	None	<Multiplier value>
Household Size	Number of boys between 4 years and 15 years?	Four+	<Multiplier value>

CATEGORY DESCRIPTION	ASSESSMENT QUESTION	ASSOCIATED ANSWERS	RELATED PRODUCT(S)
Household Size	Number of boys between 4 years and 15 years?	Three	<Multiplier value>
Household Size	Number of boys between 4 years and 15 years?	None	<Multiplier value>
Household Size	Number of boys between 4 years and 15 years?	Two	<Multiplier value>
Household Size	Number of boys between 4 years and 15 years?	One	<Multiplier value>
Household Size	Number of girls between 4 years and 15 years?	None	<Multiplier value>
Household Size	Number of girls between 4 years and 15 years?	Four+	<Multiplier value>
Household Size	Number of girls between 4 years and 15 years?	Three	<Multiplier value>
Household Size	Number of girls between 4 years and 15 years?	Two	<Multiplier value>
Household Size	Number of girls between 4 years and 15 years?	One	<Multiplier value>
Household Size	Number of children between 0 and three years?	Four+	<Multiplier value>
Household Size	Number of children between 0 and three years?	Three	<Multiplier value>
Household Size	Number of children between 0 and three years?	Two	<Multiplier value>
Household Size	Number of children between 0 and three years?	One	<Multiplier value>
Household Size	Number of children between 0 and three years?	None	<Multiplier value>
Household Size	Number of pet cats in the household?	None	<Multiplier value>
Household Size	Number of pet cats in the household?	Two	<Multiplier value>
Household Size	Number of pet cats in the household?	One	<Multiplier value>
Household Size	Number of pet cats in the household?	Four+	<Multiplier value>
Household Size	Number of pet cats in the household?	Three	<Multiplier value>
Household Size	Number of pet dogs in the household?	One	<Multiplier value>

CATEGORY DESCRIPTION	ASSESSMENT QUESTION	ASSOCIATED ANSWERS	RELATED PRODUCT(S)
Household Size	Number of pet dogs in the household?	None	<Multiplier value>
Household Size	Number of pet dogs in the household?	Four+	<Multiplier value>
Household Size	Number of pet dogs in the household?	Three	<Multiplier value>
Household Size	Number of pet dogs in the household?	Two	<Multiplier value>
Household Size	Do you own a second home, cottage, or Rec Vehicle?	No	<Multiplier value>
Household Size	Do you own a second home, cottage, or Rec Vehicle?	Yes	<Multiplier value>
Household Size	Does anyone in your home smoke?	No	<no product>
Household Size	Does anyone in your home smoke?	Yes	Fabric Freshner™
Household Size	Does anyone in your home wear glasses?	No	<no product>
Household Size	Does anyone in your home wear glasses?	Yes	SeeSpray™ Lens Cleaner
Household Size	Does anyone in your home wear contact lenses?	No	<no product>
Household Size	Does anyone in your home wear contact lenses?	Yes	Saline solution, multi-purpose solution
Household Size	How many turtles are in your house?	None	<no product>
Household Size	How many turtles are in your house?	Four+	<Multiplier value>, turtle food
Household Size	How many turtles are in your house?	Three	<Multiplier value>, turtle food
Household Size	How many turtles are in your house?	Two	<Multiplier value>, turtle food
Household Size	How many turtles are in your house?	One	<Multiplier value>, turtle food
Residence Type/Layout	Number of bathrooms?	Four+	Pursue™ Toilet Bowl Cleaner, Pursue™ Disinfectant cleaner
Residence Type/Layout	Number of bathrooms?	Three	Pursue™ Toilet Bowl Cleaner, Pursue™ Disinfectant cleaner
Residence Type/Layout	Number of bathrooms?	Two	Pursue™ Toilet Bowl Cleaner, Pursue™ Disinfectant cleaner
Residence Type/Layout	Number of bathrooms?	One	Pursue™ Toilet Bowl Cleaner, Pursue™ Disinfectant cleaner
Residence Type/Layout	Number of bathrooms?	None	<no product>
Residence Type/Layout	Approximately how many square feet is your house?	3500-4500sq ft	<Multiplier value>

CATEGORY DESCRIPTION	ASSESSMENT QUESTION	ASSOCIATED ANSWERS	RELATED PRODUCT(S)
Residence Type/Layout	Approximately how many square feet is your house?	2500-3500sq ft	<Multiplier value>
Residence Type/Layout	Approximately how many square feet is your house?	1500-2500sq ft	<Multiplier value>
Residence Type/Layout	Approximately how many square feet is your house?	Less than 1500sq ft	<Multiplier value>
Residence Type/Layout	What % of your floors are covered in Hardwood?	>75%	<Multiplier value>, Durashine™ Floor Polish
Residence Type/Layout	What % of your floors are covered in Hardwood?	50-75%	<Multiplier value>, Durashine™ Floor Polish
Residence Type/Layout	What % of your floors are covered in Hardwood?	25-50%	<Multiplier value>, Durashine™ Floor Polish
Residence Type/Layout	What % of your floors are covered in Hardwood?	Less than 25%	<Multiplier value>, Durashine™ Floor Polish
Residence Type/Layout	What % of your floors are covered in Hardwood?	None	<no product>
Residence Type/Layout	What % of your floors are covered in Linoleum?	None	<no product>
Residence Type/Layout	What % of your floors are covered in Linoleum?	>75%	<Multiplier value>, Durashine™ Floor Polish
Residence Type/Layout	What % of your floors are covered in Linoleum?	50-75%	<Multiplier value>, Durashine™ Floor Polish
Residence Type/Layout	What % of your floors are covered in Linoleum?	25-50%	<Multiplier value>, Durashine™ Floor Polish
Residence Type/Layout	What % of your floors are covered in Linoleum?	Less than 25%	<Multiplier value>, Durashine™ Floor Polish
Residence Type/Layout	What % of your floors are covered in Tile?	50-75%	<Multiplier value>, Durashine™ Floor Polish
Residence Type/Layout	What % of your floors are covered in Tile?	25-50%	<Multiplier value>, Durashine™ Floor Polish
Residence Type/Layout	What % of your floors are covered in Tile?	Less than 25%	<Multiplier value>, Durashine™ Floor Polish
Residence Type/Layout	What % of your floors are covered in Tile?	None	<no product>
Residence Type/Layout	What % of your floors are covered in Tile?	>75%	<Multiplier value>, Durashine™ Floor Polish
Residence Type/Layout	What % of your floors	None	<no product>

CATEGORY DESCRIPTION	ASSESSMENT QUESTION	ASSOCIATED ANSWERS	RELATED PRODUCT(S)
	are covered in Carpet?		
Residence Type/Layout	What % of your floors are covered in Carpet?	25-50%	<Multiplier value>, Carpet Shampoo, Magic Foam™ Carpet Cleaner
Residence Type/Layout	What % of your floors are covered in Carpet?	Less than 25%	<Multiplier value>, Carpet Shampoo, Magic Foam™ Carpet Cleaner
Residence Type/Layout	What % of your floors are covered in Carpet?	>75%	<Multiplier value>, Carpet Shampoo, Magic Foam™ Carpet Cleaner
Residence Type/Layout	What % of your floors are covered in Carpet?	50-75%	<multiplier>, Carpet Shampoo, Magic Foam™ Carpet Cleaner
Residence Type/Layout	What is the approximate age of your home?	10-25years	<Multiplier value>
Residence Type/Layout	What is the approximate age of your home?	0-10years	<Multiplier value>
Residence Type/Layout	What is the approximate age of your home?	Over 50 years	<Multiplier value>
Residence Type/Layout	What is the approximate age of your home?	25-50years	<Multiplier value>
Residence Type/Layout	How many cars do you drive?	Two+	<Multiplier value>
Residence Type/Layout	How many cars do you drive?	One	<Multiplier value>
General Cleaning	Do you use counter top cleaner?	Yes	Pursue™ Disinfectant cleaner, SeeSpray™, Chrome & Glass cleaner
General Cleaning	Do you use counter top cleaner?	No	<no product>
General Cleaning	Does your home have an automatic dishwasher?	Yes	Crystal Bright™ automatic dishwashing formula (hard or soft formula)
General Cleaning	Does your home have an automatic dishwasher?	No	<no product>
General Cleaning	Does your home have soft water?	No	<apply to dishwasher question>
General Cleaning	Does your home have soft water?	Yes	<apply to dishwasher question>
General Cleaning	Do you use a cleaning service?	Yes	<no product>
General Cleaning	Do you use a cleaning service?	No	Floor polish, dusting spray, bathroom

CATEGORY DESCRIPTION	ASSESSMENT QUESTION	ASSOCIATED ANSWERS	RELATED PRODUCT(S)
			cleaner
Laundry	Do you use liquid laundry Detergent?	Yes	SA8™ Detergent - Liquid
Laundry	Do you use liquid laundry Detergent?	No	<no product>
Laundry	Do you use powdered laundry detergent?	Yes	SA8™ Detergent - Powder
Laundry	Do you use powdered laundry detergent?	No	<no product>
Laundry	Do you use a liquid stain remover?	Yes	Pre-Wash spot treatment
Laundry	Do you use a liquid stain remover?	No	<no product>
Laundry	Do you use an all fabric type bleach?	Yes	SA8™ all-fabric bleach
Laundry	Do you use an all fabric type bleach?	No	<no product>
Laundry	Do you use an aerosol stain remover?	Yes	Pre-Wash spot treatment
Laundry	Do you use an aerosol stain remover?	No	<no product>
Laundry	Do you use a chlorine bleach?	Yes	SA8™ Dry Chlorine bleach
Laundry	Do you use a chlorine bleach?	No	<no product>
Laundry	Do you ever use a Laundromat?	Often	<Multiplier value>, SA8™ Samples
Laundry	Do you ever use a Laundromat?	Occasionally	<Multiplier value>, SA8™ Samples
Laundry	Do you ever use a Laundromat?	Rarely	<Multiplier value>, SA8™ Samples
Laundry	Do you ever use a Laundromat?	Never	<no product>
Personal Care	How many family members use shaving cream?	Four+	<Multiplier value>, Grooming Gear™ shave cream
Personal Care	How many family members use shaving cream?	Three	<Multiplier value>, Grooming Gear™ shave cream
Personal Care	How many family members use shaving cream?	Two	<Multiplier value>, Grooming Gear™ shave cream
Personal Care	How many family members use shaving cream?	One	<Multiplier value>, Grooming Gear™ shave cream
Personal Care	How many family members use shaving cream?	None	<no product>
Personal Care	How many family members have oily skin?	One	<Multiplier value>, Artistry™
Personal Care	How many family members have oily skin?	None	<no product>

CATEGORY DESCRIPTION	ASSESSMENT QUESTION	ASSOCIATED ANSWERS	RELATED PRODUCT(S)
Personal Care	How many family members have oily skin?	Four+	<Multiplier value>, Artistry™
Personal Care	How many family members have oily skin?	Three	<Multiplier value>, Artistry™
Personal Care	How many family members have oily skin?	Two	<Multiplier value>, Artistry™
Personal Care	How many family members have dry skin?	None	<no product>
Personal Care	How many family members have dry skin?	Four+	<Multiplier value>, Artistry™
Personal Care	How many family members have dry skin?	Three	<Multiplier value>, Artistry™
Personal Care	How many family members have dry skin?	Two	<Multiplier value>, Artistry™
Personal Care	How many family members have dry skin?	One	<Multiplier value>, Artistry™
Personal Care	How many family members have sensitive skin?	Three	<Multiplier value>, Artistry™
Personal Care	How many family members have sensitive skin?	Two	<Multiplier value>, Artistry™
Personal Care	How many family members have sensitive skin?	One	<Multiplier value>, Artistry™
Personal Care	How many family members have sensitive skin?	None	<no product>
Personal Care	How many family members have sensitive skin?	Four+	<Multiplier value>, Artistry™
Personal Care	How many family members wear makeup?	None	<no product>
Personal Care	How many family members wear makeup?	Two	<Multiplier value>, Artistry™
Personal Care	How many family members wear makeup?	One	<Multiplier value>, Artistry™
Personal Care	How many family members wear makeup?	Four+	<Multiplier value>, Artistry™
Personal Care	How many family members wear makeup?	Three	<Multiplier value>, Artistry™
Personal Care	How many use an alpha hydroxy product?	One	<Multiplier value>, Artistry™
Personal Care	How many use an alpha hydroxy product?	None	<no product>
Personal Care	How many use an alpha hydroxy product?	Four+	<Multiplier value>, Artistry™
Personal Care	How many use an alpha hydroxy product?	Three	<Multiplier value>, Artistry™
Personal Care	How many use an alpha hydroxy product?	Two	<Multiplier value>, Artistry™

CATEGORY DESCRIPTION	ASSESSMENT QUESTION	ASSOCIATED ANSWERS	RELATED PRODUCT(S)
Personal Care	How many family members use mouthwash?	None	<no product>
Personal Care	How many family members use mouthwash?	Four+	<Multiplier value>, Glister™ Oral Rinse, Sweet Shot™
Personal Care	How many family members use mouthwash?	Three	<Multiplier value>, Glister™ Oral Rinse, Sweet Shot™
Personal Care	How many family members use mouthwash?	Two	<Multiplier value>, Glister™ Oral Rinse, Sweet Shot™
Personal Care	How many family members use mouthwash?	One	<Multiplier value>, Glister™ Oral Rinse, Sweet Shot™
Personal Care	How many family members use dental floss?	Four+	<Multiplier value>
Personal Care	How many family members use dental floss?	Three	<Multiplier value>
Personal Care	How many family members use dental floss?	Two	<Multiplier value>
Personal Care	How many family members use dental floss?	One	<Multiplier value>
Personal Care	How many family members use dental floss?	None	<no product>
Personal Care	How many family members use stick deodorant?	None	<no product>
Personal Care	How many family members use stick deodorant?	Two	<Multiplier value>, Deter™ Deodorant
Personal Care	How many family members use stick deodorant?	One	<Multiplier value>, Deter™ Deodorant
Personal Care	How many family members use stick deodorant?	Four+	<Multiplier value>, Deter™ Deodorant
Personal Care	How many family members use stick deodorant?	Three	<Multiplier value>, Deter™ Deodorant
Personal Care	How many family members use spray deodorant?	One	<Multiplier value>, Deter™ Deodorant
Personal Care	How many family members use spray deodorant?	None	<no product>
Personal Care	How many family members use spray deodorant?	Four+	<Multiplier value>, Deter™ Deodorant

CATEGORY DESCRIPTION	ASSESSMENT QUESTION	ASSOCIATED ANSWERS	RELATED PRODUCT(S)
Personal Care	How many family members use spray deodorant?	Three	<Multiplier value>, Deter™ Deodorant
Personal Care	How many family members use spray deodorant?	Two	<Multiplier value>, Deter™ Deodorant
Personal Care	How many family members use roll-on deodorant?	None	<no product>
Personal Care	How many family members use roll-on deodorant?	Four+	<Multiplier value>, Deter™ Deodorant
Personal Care	How many family members use roll-on deodorant?	Three	<Multiplier value>, Deter™ Deodorant
Personal Care	How many family members use roll-on deodorant?	Two	<Multiplier value>, Deter™ Deodorant
Personal Care	How many family members use roll-on deodorant?	One	<Multiplier value>, Deter™ Deodorant
Personal Care	How many family members use pump type hair spray?	Three	<Multiplier value>
Personal Care	How many family members use pump type hair spray?	Two	<Multiplier value>
Personal Care	How many family members use pump type hair spray?	One	<Multiplier value>
Personal Care	How many family members use pump type hair spray?	None	<Multiplier value>
Personal Care	How many family members use pump type hair spray?	Four+	<Multiplier value>
Personal Care	How many family members use aerosol hair spray?	None	<no product>
Personal Care	How many family members use aerosol hair spray?	Two	<Multiplier value>
Personal Care	How many family members use aerosol hair spray?	One	<Multiplier value>
Personal Care	How many family members use aerosol hair spray?	Four+	<Multiplier value>
Personal Care	How many family members use aerosol hair spray?	Three	<Multiplier value>
Personal Care	How many family members use hair styling gel?	One	<Multiplier value>

CATEGORY DESCRIPTION	ASSESSMENT QUESTION	ASSOCIATED ANSWERS	RELATED PRODUCT(S)
Personal Care	How many family members use hair styling gel?	None	<no product>
Personal Care	How many family members use hair styling gel?	Four+	<Multiplier value>
Personal Care	How many family members use hair styling gel?	Three	<Multiplier value>
Personal Care	How many family members use hair styling gel?	Two	<Multiplier value>
Personal Care	How many family members use hair styling mousse?	None	<no product>
Personal Care	How many family members use hair styling mousse?	Four+	<Multiplier value>
Personal Care	How many family members use hair styling mousse?	Three	<Multiplier value>
Personal Care	How many family members use hair styling mousse?	Two	<Multiplier value>
Personal Care	How many family members use hair styling mousse?	One	<Multiplier value>
Personal Care	How many family members use hair conditioner?	Four+	<Multiplier value>, Satinique™
Personal Care	How many family members use hair conditioner?	Three	<Multiplier value>, Satinique™
Personal Care	How many family members use hair conditioner?	Two	<Multiplier value>, Satinique™
Personal Care	How many family members use hair conditioner?	One	<Multiplier value>, Satinique™
Personal Care	How many family members use hair conditioner?	None	<no product>
Personal Care	How many use hair shampoo/conditioner combination?	None	<no product>
Personal Care	How many use hair shampoo/conditioner combination?	Two	<Multiplier value>, Satinique™
Personal Care	How many use hair shampoo/conditioner combination?	One	<Multiplier value>, Satinique™
Personal Care	How many use hair shampoo/conditioner combination?	Four+	<Multiplier value>, Satinique™

CATEGORY DESCRIPTION	ASSESSMENT QUESTION	ASSOCIATED ANSWERS	RELATED PRODUCT(S)
Personal Care	How many use hair shampoo/conditioner combination?	Three	<Multiplier value>, Satinique™
Personal Care	How many members use a dandruff control product?	One	<Multiplier value>, Satinique™
Personal Care	How many members use a dandruff control product?	None	<no product>
Personal Care	How many members use a dandruff control product?	Four+	<Multiplier value>, Satinique™
Personal Care	How many members use a dandruff control product?	Three	<Multiplier value>, Satinique™
Personal Care	How many members use a dandruff control product?	Two	<Multiplier value>, Satinique™
Health & Nutrition	How many family members use a multi vitamin?	One	<Multiplier value>, Double X™
Health & Nutrition	How many family members use a multi vitamin?	None	<no product>
Health & Nutrition	How many family members use a multi vitamin?	Four+	<Multiplier value>, Double X™
Health & Nutrition	How many family members use a multi vitamin?	Three	<Multiplier value>, Double X™
Health & Nutrition	How many family members use a multi vitamin?	Two	<Multiplier value>, Double X™
Health & Nutrition	How many family members use energy products?	Four+	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members use energy products?	Three	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members use energy products?	Two	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members use energy products?	One	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members use energy products?	None	<no product>
Health & Nutrition	How many family members use Herbal products?	Four+	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members use Herbal products?	Three	<Multiplier value>, Nutrilite™

CATEGORY DESCRIPTION	ASSESSMENT QUESTION	ASSOCIATED ANSWERS	RELATED PRODUCT(S)
Health & Nutrition	How many family members use Herbal products?	Two	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members use Herbal products?	One	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members use Herbal products?	None	<no product>
Health & Nutrition	How many family members take Vitamin A?	Two	<Multiplier value>, Nutrilite A™
Health & Nutrition	How many family members take Vitamin A?	One	<Multiplier value>, Nutrilite A™
Health & Nutrition	How many family members take Vitamin A?	None	<no product>
Health & Nutrition	How many family members take Vitamin C?	Four+	<Multiplier value>, Nutrilite C™
Health & Nutrition	How many family members take Vitamin C?	Three	<Multiplier value>, Nutrilite C™
Health & Nutrition	How many family members take Vitamin C?	Two	<Multiplier value>, Nutrilite C™
Health & Nutrition	How many family members take Vitamin C?	One	<Multiplier value>, Nutrilite C™
Health & Nutrition	How many family members take Vitamin C?	None	<no product>
Health & Nutrition	How many family members take Vitamin A?	Four+	<Multiplier value>, Nutrilite A™
Health & Nutrition	How many family members take Vitamin A?	Three	<Multiplier value>, Nutrilite A™
Health & Nutrition	How many family members take Calcium?	None	<no product>
Health & Nutrition	How many family members take Calcium?	Four+	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members take Calcium?	Three	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members take Calcium?	Two	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members take Calcium?	One	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members take Vitamin B?	None	<no product>
Health & Nutrition	How many family members take Vitamin	Four+	<Multiplier value>, Nutrilite™

CATEGORY DESCRIPTION	ASSESSMENT QUESTION	ASSOCIATED ANSWERS	RELATED PRODUCT(S)
	B?		
Health & Nutrition	How many family members take Vitamin B?	Three	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members take Vitamin B?	Two	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members take Vitamin B?	One	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members take Vitamin E?	Four+	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members take Vitamin E?	Three	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members take Vitamin E?	Two	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members take Vitamin E?	One	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members take Vitamin E?	None	<no product>
Health & Nutrition	How many family members take Children's Vitamins?	Three	<Multiplier value>, Nutrilite Chewables™
Health & Nutrition	How many family members take Children's Vitamins?	Two	<Multiplier value>, Nutrilite Chewables™
Health & Nutrition	How many family members take Children's Vitamins?	One	<Multiplier value>, Nutrilite Chewables™
Health & Nutrition	How many family members take Children's Vitamins?	None	<no product>
Health & Nutrition	How many family members take Children's Vitamins?	Four	<Multiplier value>, Nutrilite Chewables™
Health & Nutrition	How many family members use Memory products?	Four+	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members use Memory products?	Three	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members use Memory products?	Two	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members use Memory products?	One	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members use Memory products?	None	<no product>

CATEGORY DESCRIPTION	ASSESSMENT QUESTION	ASSOCIATED ANSWERS	RELATED PRODUCT(S)
	products?		
Health & Nutrition	How many members use Weight Control products?	One	<Multiplier value>, Nutrilite™
Health & Nutrition	How many members use Weight Control products?	None	<no product>
Health & Nutrition	How many members use Weight Control products?	Four+	<Multiplier value>, Nutrilite™
Health & Nutrition	How many members use Weight Control products?	Three	<Multiplier value>, Nutrilite™
Health & Nutrition	How many members use Weight Control products?	Two	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members use Sports products?	None	<no product>
Health & Nutrition	How many family members use Sports products?	Four+	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members use Sports products?	Three	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members use Sports products?	Two	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members use Sports products?	One	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members use Prostate products?	Four+	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members use Prostate products?	Three	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members use Prostate products?	Two	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members use Prostate products?	One	<Multiplier value>, Nutrilite™
Health & Nutrition	How many family members use Prostate products?	None	<no product>
Misc -- Drinks	Do you prefer "premium" blend coffee each day?	Yes	Nine To Five™ Coffee
Misc -- Drinks	Do you prefer "premium" blend coffee each day?	No	<no product>
Misc -- Drinks	How many cups of regular coffee do you	One	<Multiplier value>, Nine To Five™ Coffee

CATEGORY DESCRIPTION	ASSESSMENT QUESTION	ASSOCIATED ANSWERS	RELATED PRODUCT(S)
	make daily?		
Misc -- Drinks	How many cups of regular coffee do you make daily?	None	<no product>
Misc -- Drinks	How many cups of regular coffee do you make daily?	Four+	<Multiplier value>, Nine To Five™ Coffee
Misc -- Drinks	How many cups of regular coffee do you make daily?	Three	<Multiplier value>, Nine To Five™ Coffee
Misc -- Drinks	How many cups of regular coffee do you make daily?	Two	<Multiplier value>, Nine To Five™ Coffee
Misc -- Drinks	How many cups of decaf coffee do you make daily?	None	<no product>
Misc -- Drinks	How many cups of decaf coffee do you make daily?	Four+	<Multiplier value>, Nine To Five™ Coffee
Misc -- Drinks	How many cups of decaf coffee do you make daily?	Three	<Multiplier value>, Nine To Five™ Coffee
Misc -- Drinks	How many cups of decaf coffee do you make daily?	Two	<Multiplier value>, Nine To Five™ Coffee
Misc -- Drinks	How many cups of decaf coffee do you make daily?	One	<Multiplier value>, Nine To Five™ Coffee
Misc -- Drinks	How many cups of tea do you make daily?	Four+	<Multiplier value>, Nine To Five™ Tea
Misc -- Drinks	How many cups of tea do you make daily?	Three	<Multiplier value>, Nine To Five™ Tea
Misc -- Drinks	How many cups of tea do you make daily?	Two	<Multiplier value>, Nine To Five™ Tea
Misc -- Drinks	How many cups of tea do you make daily?	One	<Multiplier value>, Nine To Five™ Tea
Misc -- Drinks	How many cups of tea do you make daily?	None	<no product>
Cars	How many cars do you own?	None	<no product>
Cars	How many cars do you own?	Two	<Multiplier value>
Cars	How many cars do you own?	One	<Multiplier value>
Cars	How many cars do you own?	Four+	<Multiplier value>
Cars	How many cars do you own?	Three	<Multiplier value>
Cars	Do you wash your own car?	Yes	Mint Condition™ Car Wash, Gel & Tar Remover, Trim & Tire Protectant
Cars	Do you wash your own car?	No	<no product>

CATEGORY DESCRIPTION	ASSESSMENT QUESTION	ASSOCIATED ANSWERS	RELATED PRODUCT(S)
Cars	Do you wax your own car?	Yes	Mint Condition™ Car Wash, Gel & Tar Remover, Trim & Tire Protectant
Cars	Do you wax your own car?	No	<no product>
Cars	Do you change your car's oil yourself?	Yes	Freedom™ Synthetic Oil
Cars	Do you change your car's oil yourself?	No	<no product>
Cars	Do you use a fuel additive?	Yes	Freedom™ Fuel Additive
Cars	Do you use a fuel additive?	No	<no product>

In one embodiment, the interactive messages consist of a linear set of interrogatives such as those shown in Table 1.0 above. The assessment interface 222 provides a structural framework within which marketers of the vendor 104A, B or order management system 108 may specify the interrogatives, expected responses and associated products or operations to be performed. The framework permits the marketer to define one or more categories of interrogatives. Within each category, the marketer specifies one or more interrogative messages and the expected responses. In actual use, the interrogative is presented along with a pick-list which displays the acceptable choices. The consumer 102 picks the appropriate response from the list. In addition, for each response, the marketer can define an associated product or group of products and/or an operation or rule to be performed on the consumer's 102 response. The rule may consist of a mathematical calculation using the consumer's response and stored data regarding the associated product. Further, the calculation may take into account the responses from other interrogatives. In one embodiment, each rule associated with each product or products is further associated with a predicted/assumed recommended annual usage rate for that product for one average person as determined by the marketing department. For example, a "yes" response to "do you use a powdered laundry detergent?" would be associated with SA8™ laundry detergent and further associated with the response to the interrogative for "How many adults are in your household?". The associated rule then would compute the

average recommended annual usage for one person of SA8 times the number of people in the household. Where the number of children are factored in, a $\frac{1}{2}$ multiplier may be included to account for the lower usage rate of a child versus the predicted average person. In this way, the numeric responses are multiplied against the average annual usage to determine the total product quantity to deliver in a year. One or more interrogatives may also be formatted to make a more accurate determination of actual usage rates rather than rely on the predicted usage rates. For example, rather than simply asking the consumer whether or not they do laundry and using a predicted average annual usage rate, the interrogatives may ask how often the consumer 102 does laundry and how many load are done each time. Using this information, the total number of loads can be computed and divided into the known number of loads in 1 unit of SA8 laundry detergent to arrive at the recommended quantity.

In operation, the assessment interface 222 presents a list of interrogatives to the consumer 102 via a web page. The consumer 102 uses the pick-lists corresponding to each interrogative to set their responses. The consumer 102 then selects a "submit" button which sends the interrogatives, responses and associated rules to a host mainframe which computes the results of all of the rules. The rules determine the recommended annual quantities that the consumer 102 must purchase, computed as the suggested annual number of unit quantities of the product that should be purchased. Fractional unit quantities are appropriately rounded. In an alternative embodiment, the unit quantity determination factors in the availability of different unit sizes, such as a 12 oz and 24 oz size. Logic then determines which quantity size is appropriate for each unit given the usage rate and the computed annual unit quantities. Such determinations may further be based on the availability of discounts, for example, for bulk purchases.

Once the number of unit quantities for the year are determined, calendaring and scheduling logic is applied to determine how to spread the delivery those unit quantities over the year. Table 2.0 shows the logic utilized to spread the delivery schedule. This table is defined by the marketing department of the vendor 104A,

B and may be adjusted accordingly by a specific vendor 104A, B depending on the types of products or services they sell and their customer's needs.

Table 2.0

NO. OF UNITS PER YEAR	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
1	1	0	0	0	0	0	0	0	0	0	0	0
2	1	0	0	0	0	1	0	0	0	0	0	0
3	1	0	0	0	1	0	0	0	1	0	0	0
4	1	0	0	1	0	0	1	0	0	1	0	0
5	1	0	1	0	1	0	1	0	0	1	0	0
6	1	0	1	0	1	0	1	0	1	0	1	0
7	1	1	0	1	0	1	1	0	1	1	0	0
8	1	1	0	1	1	0	1	1	0	1	1	0
9	1	1	1	0	1	1	1	1	0	1	1	0
10	1	1	1	1	1	0	1	1	1	1	1	0
11	1	1	1	1	1	1	1	1	1	1	1	0
12	1	1	1	1	1	1	1	1	1	1	1	1
13	2	1	1	1	1	1	1	1	1	2	1	0
14	2	1	1	1	1	1	1	1	1	2	1	1
15	2	1	1	1	2	1	1	1	2	1	1	1
16	2	1	1	1	2	1	1	1	2	1	2	1
17	2	2	2	0	2	2	0	2	2	2	0	1
18	2	2	2	0	2	2	0	2	2	2	1	1
19	2	2	1	2	2	1	2	2	2	1	1	1
20	2	2	1	2	2	1	2	2	2	2	1	1
24	2	2	2	2	2	2	2	2	2	2	2	2

- 5 For unit quantities between 20 and 24 or in excess of 24 units, the number of units is broken down into 24 unit quantities or fractions thereof and applied to the above table. Alternatively, logic may be applied which appropriately adjusts the size of each unit, depending upon the availability of different sizes of the given product or service, as discussed above.

In an alternative embodiment, the interactive messages consist of a linear or hierarchical set of interrogatives such as those shown in Table 1.0 above. The interrogatives consist of product or service determination questions which attempt to determine that a particular product or service is or would be used and groups of quantifier questions which attempt to elicit information about how those products are or would be used. The product or service determination questions are typically yes/no questions and each questions is associated with a particular product or service. Each product or service determination question is associated with one or more quantifier questions. Each quantifier question may be associated with more than one product or service determination questions. The quantifier questions are typically numeric response questions generally directed to determining the consumer's 102 demographics and/or preferences and the responses to these questions are used as multipliers in a computation to determine the suggested quantities of the associated products or services. Some quantifier questions seek yes/no responses. In this case, each response, yes or no, is associated with a multiplier value which is used in the overall computation.

The interrogatives, associated products or services, potential acceptable responses, multipliers and overall quantity computations are marketing driven and may be dynamically adjusted to reflect changes in available products or services or changes in how consumers 102 actually use those products or services. On the back-end, the assessment interface 222 works similar to the packages/templates interface 220. Associated with each product or service determination question is a grouping of one or more products or services. For example, a "yes" response to "do you use powdered laundry detergent?" is associated with a powdered laundry detergent product and may also be associated with a powdered fabric softener. The "no" response would be associated with a liquid laundry detergent product. Each response may have an unlimited number of associated products or services. The responses to the quantifier questions associated with that product or service determination question are then used to determine the quantity and recurrence pattern. For example, the response to the quantifier question "how many times do you do laundry in a month?" is "2" and the response to the quantifier question

“how many loads do you do each time you do laundry? is “3.” If one box of powdered laundry detergent can do thirty-six loads of laundry, then one box will last this particular consumer six months using the computation of:

$$\text{use_rate}/(\text{uses_per_wash} * \text{washes_per_month}).$$
The interface 222 then suggests ordering one box of powdered laundry detergent every six months. While it will be appreciated that there are numerous ways to compute a suggested ordering frequency, typically, a suggested recurrence can be determined from the following variables:

Quantity per unit of product, i.e. number of ounces in a box

Suggested quantity per use of the product

Actual or projected number of uses by the consumer per iteration

(This may be multiplied by the number of persons in the household)

Wherein $(Q/S)/A$ = number of iterations per unit = frequency of purchase

(Appropriate adjustments can be made for fractional results and where multiple units may be required in each iteration to meet the actual or projected use.)

Figure 5 shows a block diagram of the assessment interface 222. The interface 222 includes an interface web page 502, a question database 504, a response processor 506, a quantity/frequency processor 508, a product database 510 and suggested profile generator 512. The interface web page 502 presents the interactive messages to the consumer 102. The available interactive messages are stored in the question database 504. Preferably, each consumer 102 is presented with a standard set of introductory interactive messages designed to initiate the process of determining the suggested products or services and accompanying quantities and recurrence pattern. As was described above, these introductory interactive messages are at the top level of a hierarchical or linear interrogatory structure or process flow and may lead to other interactive messages which attempt to elicit more specific and detailed responses from the consumer 102.

The consumer's 102 responses to the interactive messages are received by the response processor 506 which determines which products or services are to be suggested and gathers the factors which will be used in computing the suggested quantities and recurrence pattern for each. The product or service selection and the recurrence factors are sent to the quantity/frequency processor 508 which

computes the suggested recurrence pattern and quantity per recurrence for the particular product or service. The quantity/frequency processor 508 is coupled with a product database 510 which supplies information about the recommended and/or reported uses of the products or services. The product database 510 further contains information about the availability of products or services in various unit quantities, the recommended quantity per use of the product or service and the predicted lifespan, use rate or shelf life of the product or service. The product database 510 may be provided by the vendor 104A, B or by the order management system 108. In one embodiment, the order management system 108 accesses the product database 510 via the network 106. Once the suggested product or service and associated recurrence has been determined, the information is passed to the suggested profile generator 512 which generates the suggested profile entries for the particular product or service. As the consumer 102 progresses through more interactive messages, the process is repeated for each suggested product or service. At any time, the consumer 102 may indicate that they are finished with the assessment of their needs. The suggested profile is then made available for balancing (described in more detail below) or sent to the profile confirmation/modification interface 226 (described in more detail below).

Referring to Figure 2, the transaction history interface 224 provides an additional method for assisting the consumer 102 with specifying or updating a profile 210 with suggested products or services. The transaction history interface 224 is coupled with the order processing system of the vendor 104A, B so as to access the order history of the consumer 102. In one embodiment, the consumer 102 accesses the transaction history interface 224 and requests an analysis of their order history with one or more particular vendors 104A, B. Where the transaction history interface 224 determines a recurring pattern of purchases, the interface 224 suggests adding that particular product or service to a standing order profile 210 at the determined recurrence. In an alternative embodiment, the vendor 104A, B accesses the transaction history interface 224 to determine recurring patterns within that particular vendor's 104A, B consumer 102 base. The vendor 104A, B suggests to consumers 102 particular products or services for a standing order

profile to increase their shopping convenience. This suggestion may be tied to a promotional offer. In yet another embodiment, the transaction history of other consumers 102, such as a consumer 102 of a same or similar demographic is used to generate a suggested profile for a particular consumer 102 or group of consumers 102.

The calculator function 214 provides a tool for a consumer 102 to determine a suggested recurrence or quantity for a particular product or service. The calculator function 214 is preferably made available from any of the interfaces 212, 232, 218, 220, 222, 224. In one embodiment, the calculator function 214 is an interactive pop up web page window. In another embodiment, the calculator function 214 is linked with the vendor's 104A, B product description web pages or shopping cart web pages and is made available via a selectable button or automatically displays when a product or service is selected. Selection of the link automatically identifies the product or service to the calculator function 214. The calculator function 214 receives information from the consumer 102 identifying a particular product or service, such as by SKU, name or description, provided manually or automatically as described above, and intended or actual usage information about that particular product or service. The calculator function 214 then computes a suggested recurrence and quantity per recurrence for that particular product or service. In one embodiment, the calculator function 214 generates a suggested profile entry for the particular product or service within the suggested profile 210. In an alternate embodiment, the calculator function displays the suggested results and allows the consumer 102 to enter the information into their profile 210.

Figure 4 shows a block diagram of the calculator function 214. The calculator function 214 includes a product identifier input 402, user data input 404, a quantity frequency processor 406, a product database 408 and a suggested profile entry generator 410. The inputs 402, 404 accept an identifier of the desired product or service and information about the consumer's 102 intended or actual usage of that particular product or service, as described above. These inputs 402, 404 are sent to the quantity/frequency processor 406 which computes the

suggested recurrence and quantity per recurrence based on the user data inputs 404 and information about the product or service retrieved from the product database 408. The product database 408 supplies information about the recommended and/or reported uses of the products or services. The product database 408 further contains information about the availability of products or services in various unit quantities, the recommended quantity per use of the product or service and the predicted lifespan, shelf life or use rate of the product or service. The product database 408 may be provided by the vendor 104A, B or by the order management system 108. In one embodiment, the order management system 108 accesses the product database 408 via the network 106. Once the suggested recurrence has been computed, the information is passed to the suggested profile entry generator 410 which generates the suggested profile entries for the particular product or service. The consumer 102 may repeat the calculation function 214 for one or more products or services. At any time, the consumer 102 may indicate that they are finished with the calculation function 214. The suggested profile entries are then made available for balancing (described in more detail below) or sent to the profile confirmation/modification interface 226 (described in more detail below).

The packages/templates interface 220, the assessment interface 222, the transaction history interface 224 and the calculator function 214 are all designed to make creation and management of the recurring order profile 210 more convenient. Each of these interfaces 220, 222, 224, 214 are designed so that the consumer 102 does not have to figure out which products or services, what quantities of those products or services they need and/or when they should get them. These interfaces 220, 222, 224, 214 provide a method of analyzing the needs of the consumer 102 and offering them suggested products or services, suggested quantities and a suggested recurrence pattern in an automated and easy to use fashion. Vendors 104A, B benefit from increased customer retention and loyalty, and consumer's 102 benefit from convenience and control. Each interface 220, 222, 224, 214 effectively receives a request from a consumer 102 for suggestions of products or services to add to a standing order, suggested quantities of those products or services and a suggested recurrence pattern. The interfaces

220, 222, 224, 214 facilitate extracting the information from the consumer 102 necessary to make logical suggestions and generate an appropriate suggested profile 210.

Referring to Figure 2, the profile generator 202 further provides a
balancing function 216. The balancing function 216 equalizes the quantities
and/or costs of each iteration of a recurring order as a function of the life of the
order where the cost or quantity would otherwise vary as a function of the
iteration. The balancing function 216 provides an interface for manipulating a
suggested or existing profile 210 as described below. In one embodiment, the
balancing function 216 comprises a pop up web page window accessible from any
of the interfaces 212, 232, 218, 220, 222, 224 via a selectable button. In
alternative embodiments, the balancing function 216 may comprise its own web
page. Once a suggested profile 210 has been generated, there may be one or more
anomalies in the recurrence pattern of that profile 210. Such anomalies include
disproportionate quantities or costs for a particular recurrence iteration or set of
iterations as compared to one or more of the remaining iterations or as compared
to the life of the recurring order. In such cases, while the delivered quantities and
recurrence pattern may represent an efficient distribution of ordered products or
services with respect to usage, there may be a resultant disproportionate cost or
quantity in one or more iterations. In other cases, the suggested quantities and
recurrence pattern may not represent the most efficient distribution for that
particular consumer 102. For example, in one month, the consumer 102 may
receive a large quantity of a particular product or service and receive nothing over
the next 5 months. Another example is where, in one month, the total order cost is
\$500 or more while the costs for the orders over the next 5 months are each less
than \$100. In these cases, the consumer 102 can choose to apply the balancing
function 216 to the suggested profile 210.

The balancing function 216 spreads the distribution of the quantities and or
costs more evenly across all of the or the remaining iterations of the order. In this
way, disproportionate iterations are mitigated. In one embodiment, the consumer
102 may balance their profile 210 as a function of a total order cost, individual

product or service cost, quantity per product or service, total order quantity or combinations thereof.

In an alternate embodiment wherein the order management system 108 or vendor 104A, B offers incentives or requires minimum purchases per iteration of the recurring order, the balancing function 216 can be used to spread the distribution of the iterations so as to maximize the earned incentives or ensure that monthly minimums are met without substantially increasing the ordered quantities. Further, wherein the vendor 104A, B comprises a multi-level marketing system which attaches incentive compensation value to each product or service, the balancing function 216 may be used to equalize the compensation earned on a monthly, weekly, or other interval, basis for the ordered products or services. Where the consumer 102 is a direct sales, retail or wholesale business, such balancing may be further used to ensure that sales goals are met for each iteration or to match the recurring order cycle to an inventory cycle. The consumer 102 may repeat the balancing function 216 for one or more different factors. At any time, the consumer 102 may indicate that they are finished with the balancing function 216. The suggested balanced profile entries are then sent to the profile confirmation/modification interface 226.

In an alternative embodiment, the order management system 108 provides a reminder interface 218 for adding recurring reminder messages to the consumers 102 profile 210. The reminder interface 108 allows the consumer 102 to enter any message and specify a recurrence pattern for that message, as described above. The message is preferably transmitted by electronic mail wherein the reminder interface 108 further permits the consumer 102 to enter their electronic mail address for the delivery information or user information of the profile. In alternative embodiments, the message can be delivered via telephone, facsimile or postal mail, and the reminder interface 218 further permits the consumer 102 to enter the appropriate delivery information into the profile 210. The consumer 102 may specify reminder messages to be delivered to other individuals or groups of individuals besides the consumer 102 themselves, such as family members or business associates. Exemplary reminder messages include birthday or

anniversary reminders or any recurring event. Reminders may further be specified so as to couple with events which occur due to the order management system 108. For example, the consumer 102 can specify a reminder message to be transmitted one week prior to the processing of their recurring order so that they may have the opportunity to modify the order prior to processing. Alternatively, a reminder may be specified to alert the consumer 102 that their order has already been processed and that they should expect delivery soon.

Reminder messages may also be coupled with products or services specified in the profile 210. For example, a reminder may be specified for a spouse's birthday coupled with an order for a gift for that person.

In alternative embodiments, the order processing system 108 or the vendor 104A, B may include promotions or other product or service offers in the reminder message, also known as cross selling. Preferably, these promotions or other offers are included as HTTP links which allow the user to select the link and have their browser program automatically receive an order entry screen to take advantage of the offer. For example, a birthday reminder message may come with links which allow the recipient consumer 102 to purchase flowers or other gifts.

The reminder interface 218 may specify reminders for any recurring, or non-recurring event. In one embodiment, the reminder interface 218 presents a selection of pre-defined reminder messages for the consumer to select. In another embodiment, the reminder message comprises a bill payment from the consumer 102, as a debtor, to a particular creditor. The fulfillment entity 110A, B in this embodiment comprises a payment clearinghouse, bank or other bill payment facilitator. In this way, the reminder messages serve as a bill/debt payment system. The payment may also be coupled with a reminder message to the consumer 102 that the payment has been made pursuant to the profile 210. Further, in alternative embodiments, the vendor 104A, B or the order processing system 108 may add reminder messages to a consumer's profile 210 containing promotional offers or other information.

The reminder messages may be added based on an analysis of the consumer's profile 210 or purchasing history. In one embodiment, the order

processing system 108 or vendor 104A, B checks the validity of the payment information provided in the profile 210 prior to the fulfillment of the order to determine if the information is still valid. If the payment information is invalid, a reminder message can be generated to the consumer 102 to rectify the situation prior to fulfillment of the order. In another embodiment, a reminder message can be specified when a consumer 102 cancels their standing order in order to offer them a promotion or other offer to reinstate their standing order. The consumer 102 may add as many reminder messages as desired. At any time, the consumer 102 may indicate that they are finished with the reminder interface 218. The reminder interface then generates profile entries for the profile confirmation/modification interface 226 (described in more detail below).

Once the consumer 102 has completed creating or updating a profile 210 using the interfaces 212, 232, 218, 220, 222, 224, confirmation of their actions is provided by the confirmation/modification interface 226. The confirmation/modification interface 226 is preferably a web page/screen or series of web pages/screens which present the consumer 102 with the current state of their suggested profile 210 or profile 210 alterations and gives them the options to create the new suggested profile 210 or update the existing profile 210 with the suggested or new entries. Further, the interface 226 provides the functionality to allow the consumer 102 to add additional products or services, remove unwanted products or services, adjust quantities or adjust the recurrence patterns. Further, the consumer 102 may modify their user, delivery or payment information. The interface 226 preferably is convenient for a consumer 102 to view, modify or cancel their recurring order. In one embodiment, the interface 226 provides an overview of the suggested profile including projected costs, projected cost savings and an iterative cost breakdown, total quantities and other summary information. The profile 210 may be presented to the consumer 102 in a product centric structure, listing each product, service or reminder in the profile 210 in a tabular format along with the associated recurrence and quantities. In another embodiment, the profile 210 is presented in a calendar centric structure, displaying a selectable visual representation of a daily, weekly, monthly, yearly or user

specified calendar grid with the ordered products, services or reminders and associated quantities displayed according to their recurrence. In still another embodiment, both a tabular and calendar display are made available to the consumer 102 for their selection. It will be appreciated that such tabular or calendar based displays of the selected products, services or reminders and their associated quantities and recurrence patterns may also be made available via any of the interfaces 212, 232, 218, 220, 222, 224 and the calculator and balance functions 214, 216 for the purpose of displaying and/or reviewing the generated suggested products, services, reminders or associated quantities and recurrence patterns.

Further, the interface 226 provides HTTP links back to the interfaces 212, 232, 218, 220, 222, 224 and the calculator and balance functions 214, 216 so that the consumer 102 may modify one or more of their suggested profile entries. Once the consumer 102 accepts a given suggested profile 210, the entries are used to generate a new profile 210 or update an existing profile 210 in the profile database 206.

The profile database 206 stores the profiles 210 of the consumers 102 who utilize the order management system 108. Referring now to Figure 7, there is shown a schematic diagram illustrating the integration of the web site interface 702 to the order management system 108 with the profile database 206. In the preferred embodiment, this database is implemented as a DB2 database. DB2 is a relational database management system manufactured by IBM Corporation, located in Armonk, New York. The web site interface application 702 is coupled with a server computer 704 preferably running the Windows NT™ operating system, manufactured by Microsoft Corporation, located in Redmond, Washington. The server computer 704 is further running a DB2 Universal Database open database connectivity ("ODBC") application program interface ("API"). The ODBC API couples the server computer 704 with the host mainframe 706 which hosts the order management system 108 databases including the profile database 206. In the preferred embodiment, the host mainframe is an IBM ES9000 manufactured by IBM Corporation, located in Armonk, New York.

When a consumer 102 creates, modifies or otherwise accesses a profile, the web application 702 performs a function call via the server computer 704 and an ODBC connection to the host mainframe 706. The call initiates a DB2 stored procedure transaction which performs the desired function depending upon the data parameters that are passed during the call. All inquiries and updates are performed directly against the operational profile database 206 which is maintained on the host 706. It will be appreciated that other combinations of hardware and software may be used to achieve the desired functionality such as alternate database management systems such as Oracle8 manufactured by Oracle Corporation, located in Redwood Shores, California, which utilize a structured query language ("SQL") interface. In addition, other interface broker API's may also be used such as Java Database Connectivity or Common Object Request Architecture. The profile database 206 is structured as a set of four tables which maintain the information in the DB2 database described above. Referring to Figure 8, there is shown a diagram of the preferred profile database 206 tables.

The order management system 108 further provides a profile management interface 204 which allows a consumer 102 to retrieve, view, edit or delete their profile 210. The profile management interface 204 is preferably implemented as web page/screen or series of web pages/screens which implement the profile management functionality. In one embodiment, the profile management interface 204 provides links to the profile generator 202. The profile management interface 204 provides access to all of the functionality described above for managing a recurring order profile 210.

The order/reminder generator 208 is coupled with the profile database 206 and further includes an interface 230 to the fulfillment entities 110A, B. The order/reminder generator 208 periodically scans the profiles 210 stored in the database 206 to determine if any orders are scheduled to recur during that period. In the preferred embodiment, the generator scans the profile database 206 daily. It will be appreciated that the scan period is a function of the minimum allowed order recurrence interval. When a scheduled recurring order is detected for the given period, the generator processes the order and submits the order to the

fulfillment entities 110A, B to be fulfilled. In the case of reminder messages, this includes transmitting the message to an electronic mail server for transmission to the recipient. For multi-level marketing or commission based vendors 104A, B, the order generator 208 may also calculate the incentive compensation or sales bonus and assign the compensation or bonus to an appropriate business, sales person or independent business owner.

Referring to Figures 9-11, there is shown a block diagram of the preferred order generation process and fulfillment process. In the preferred embodiment, a batch process scans the profile database 206 nightly. The batch process selects all active profiles 210 which have a process day equal to the current day/date. The process then checks each product associated with the profile 210 to determine which products have been scheduled for the current month. Once this information has been determined, an order transaction is formatted which contains shipping information, such as name and address, billing information, such as credit card number, expiration date, and bonus information, such as order volume and IBO data, along with the product(s) scheduled for the month.

Once the order transaction is formatted, it is then sent via the IBM message queuing facility ("MQ") in a request queue. From the request queue, the order transaction is eventually picked up by a host ordering system which completes fulfillment. Upon completion of processing, the host ordering system places a transaction result in the MQ facility which is then picked up by the order management system 108 and the appropriate database files are updated. While the above system utilizes one process day per profile (limiting each profile to one shipment per month as was discussed above), it will be appreciated that a process day can be associated with each individual product, service or reminder allowing generation of multiple order transactions per month. In alternative embodiments, other processing time increments besides days are supported such as weekly or a particular day of the month, i.e. first Wednesday, second Tuesday, or a process which allows the profile 210 to trigger transaction processing may be implemented.

In an alternative embodiment, the order/reminder generator 208 validates the payment information provided in the profile 210 prior to transmitting the order to the fulfillment entities 110A, B. For example, the generator 208 communicates with a credit card processor to confirm that the credit card payment information provided in the profile 210 is still valid and that the credit limit has not been reached. In one embodiment, a determination of invalid payment information causes an automated message to be transmitted to the consumer 102 for remediation prior to fulfilling the order.

In another alternative embodiment, a statistical processor is coupled with the order/reminder generator for analysis of the recurring orders and profiles 210. Further, the statistical processor derives statistical information from the orders and profiles 210 for the purposes of marketing, such as for loyalty or frequency reward programs. Further the statistics can be used to optimize the order management system 108.

In another embodiment, the order management system 108 comprises a personal information manager which allows the consumer 102, in addition to storing recurring reminders and other calendar based events or product or service orders, to store contact/address book information (names, addresses), notes, journals or tasks. Further, the system 108 may also include an electronic mail box for the consumer to send and receive electronic mail. In alternative embodiments, the order management system 108 may integrate with personal information manager software such as Microsoft Outlook™, Lotus Notes™ or Novell GroupWise™ to allow profile 210 management.

In still another embodiment, the order management system 108 is accessible via wireless devices such as cellular telephones, personal digital assistants or wireless modem. This allows a consumer 102 to have constant access to their profile 210.

As described above, the disclosed embodiments provide a centralized fully automated and integrated recurring order management system 108 capable of managing recurring orders for products and services from multiple vendors 104A, B to be fulfilled by multiple fulfillment entities 110A, B. The order management

system 108 provides a calendar centric automated any product/service/reminder, any time methodology. In this way, the order management system 108 becomes an intermediary entity which increases customer convenience, satisfaction and loyalty and provides value added services to vendors 104A, B. Consumers 102 also receive a value added service in that control over recurring orders is conveniently provided to the consumer. Further, the system 108 allows the consumer 102 to efficiently consolidate and manage all of their recurring purchases and reminders in one location. In this way, the order management system 108 becomes a convenient lifestyle management system capable of handling any recurring task, purchase or event.

In this way a method for facilitating electronic commerce through a network is described. The order management system 108 server receives requests for suggested orders for products or services, suggested quantities and a suggested recurrence from a consumer's 102 client browser system via a network, such as the Internet. The request is received into one of the interfaces 220, 222, 224 which generate a suggested profile for an order of products or services, including suggested quantities and a suggested order recurrence, that will automatically recur one or more times according to the suggested recurrence.

Figures 12-22 depict representative views of the various interface screens of the preferred embodiments. Figure 12 depicts a first preferred interface screen for the recurring order management system 108. Figure 13 depicts a second preferred interface screen for the recurring order management system 108. Figure 14 depicts a first preferred descriptive screen for the recurring order management system 108. Figure 15 depicts a second preferred descriptive screen for the recurring order management system 108. Figure 16 depicts a first preferred confirmation/modification interface 226 screen for the recurring order management system 108. Figure 17 depicts a first preferred suggested profile 210 data entry interface screen for the recurring order management system 108. Figure 18 depicts a first preferred profile 210 confirmation screen for the recurring order management system 108. Figures 19A-B depict a third preferred interface screen for the recurring order management system 108. Figures 20A-B depict a first

preferred assessment interface 222 screen for the recurring order management system 108. Figures 21A-B depict a first preferred packages/templates interface 220 screen for the recurring order management system 108. Figure 22 depicts a second preferred confirmation/modification interface 226 screen for the recurring order management system 108.

It is therefore intended that the foregoing detailed description be regarded as illustrative rather than limiting, and that it be understood that it is the following claims, including all equivalents, that are intended to define the spirit and scope of this invention.